

RV BUSINESS

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A Guide to the Midwest Show

17

Unusual Units Add European Accent

11 & 12



ALL RV-TRAILER SALES BY REGION
APRIL 1992 YEAR-TO-DATE



Trailers Lead Sales Growth

34

RV BUSINESS



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RV Trailers Lead the Growth Path



East North Central: Illinois, Indiana, Michigan, Ohio, Wisconsin; Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming; Northeast: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont; Pacific: Alaska, California, Oregon, Washington, Hawaii; South Atlantic: Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia; West North Central: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota; South Central: Texas, Oklahoma, Arkansas, Louisiana, Tennessee, Mississippi, Alabama.

April 1992 reports show that the RV industry stayed a step ahead of last year's sales levels. April saw a 22.7% increase in RV-trailer sales from the preceding April (a difference of 2,559 units), while motorhomes bettered their April '91 level by a small 3.4% (131 units). Year-to-date in 1992, RV trailers gained 20.4% compared with the first four months' sales of 1991, and motorhomes logged a smaller gain of 8.9%.

Regional retail sales for April 1992 are reflected in figures 1-4, which rank the seven national regions according to their performances.

While it has been said that RVs are a leading economic indicator, the RV-trailer and motorhome markets did not seem to be pulling in tandem as the industry progressed out of last year's mire. RV-trailer sales generally showed signs of entering the recovery before the motorhome market. However, there were variations between regional markets. For example, the Northeast was the strongest area for motorhomes but the weakest for RV trailers. Perhaps motorhome sales in the strong RV markets were dormant but will quicken their pace later in the year. Although both RV markets were advancing in the first four months of '92, they still face a climb before

RV TRAILERS, APRIL '92				
Apr. '92 Rank	Region	% of Change from Apr. '91	Mar. '92 Rank	
1	Mountain	47.0	2	
2	W.N. Central	31.7	3	
3	E.N. Central	27.9	4	
4	Pacific	22.3	1	
5	Northeast	14.2	6	
6	S. Central	13.2	5	
7	S. Atlantic	12.6	7	

Figure 1

RV TRAILERS, YEAR-TO-DATE				
Apr. '92 Rank	Region	% of Change Year-to-Date	Mar. '92 Rank	
1	Mountain	39.8	2	
2	W.N. Central	38.3	1	
3	E.N. Central	23.1	3	
4	Pacific	17.7	5	
5	S. Central	14.8	4	
6	S. Atlantic	13.7	6	
7	Northeast	12.7	7	

Figure 2

MOTORHOMES, APRIL '92				
Apr. '92 Rank	Region	% of Change from Apr. '91	Mar. '92 Rank	
1	Pacific	9.9	4	
2	S. Central	9.1	5	
3	Mountain	3.0	3	
4	S. Atlantic	-0.2	7	
5	W.N. Central	-1.2	1	
6	E.N. Central	-4.2	6	
7	Northeast	-5.9	2	

Figure 3

MOTORHOMES, YEAR-TO-DATE				
Apr. '92 Rank	Region	% of Change Year-to-Date	Mar. '92 Rank	
1	Northeast	16.7	1	
2	Mountain	15.5	2	
3	S. Central	14.6	3	
4	W.N. Central	10.5	4	
5	Pacific	8.2	6	
6	E.N. Central	7.1	5	
7	S. Atlantic	-1.3	7	

Figure 4

regaining historical sales levels. *— Thomas Walworth*

Thomas Walworth is general manager of Statistical Services Inc., Grand Rapids, Mich., which has reported retail statistics to the RV industry for 20 years. Statistical Services is an acknowledged leader in the RV statistical field.

Market Trends

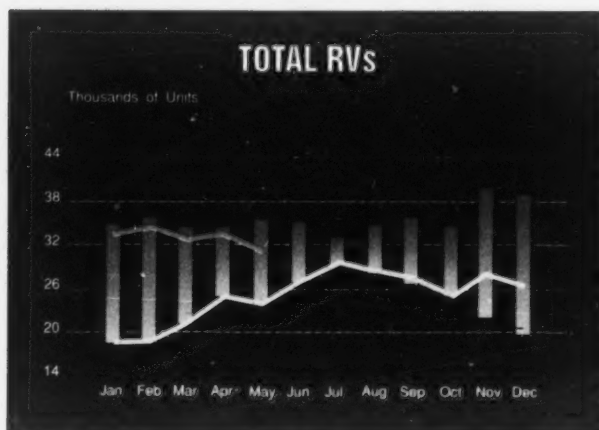


Figure 1

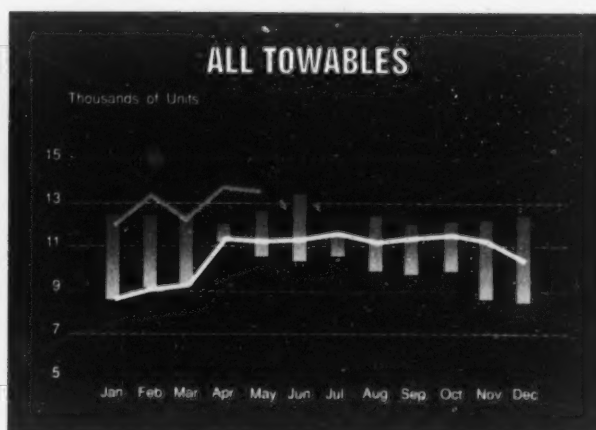


Figure 2

■ 1988-'91 Shipments Range
□ 1991 Monthly Shipments
■ 1992 Monthly Shipments

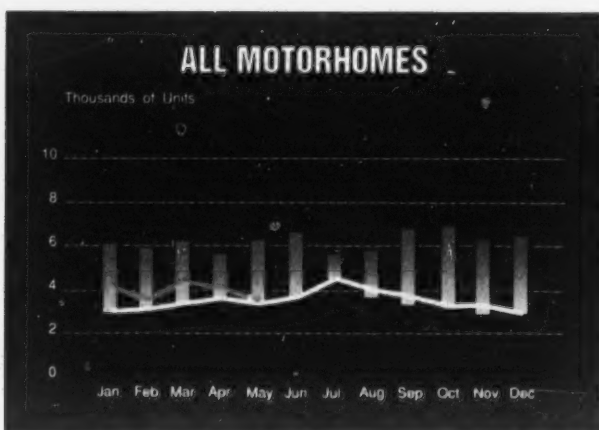


Figure 3

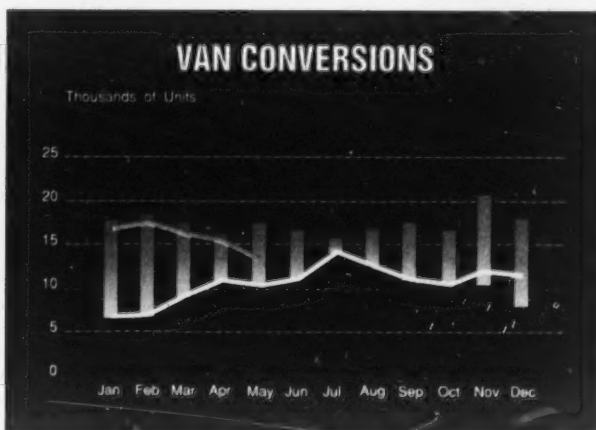


Figure 4

Industry Outpaces '91 Shipments in May

Total RV shipments in May outshone May 1991 by 23%, despite downward drifts from April '92, according to seasonally adjusted RVIA figures. Although towables slipped 9.6% from their April level, they bettered May '91 shipments by 22.7%. Motorhomes were down 10.7% from April, but rose 4.7% from May '91. Despite a 16.4% drop from April, van conversions logged a sizable 29.6% gain—from the preceding May.

An astounding 96.6% increase in total shipments during the first five months of 1992, compared with the same period of '91, demonstrates the continued strengthening of the industry since 1991 hurdles. Van conversions led the RV sectors, passing year-to-date '91 by 141.5%. They were followed by towables, recording a 70.3% jump, and motorhomes, besting '91 by 57.2%. Δ

Statistical data is supplied by Morton J. Marcus, director of the Indiana Business Research Center at Indiana University School of Business and a member of the faculty.

ANNUAL & MONTHLY COMPARISONS OF SHIPMENTS

Type of Units	May '92	% Change From Apr. '92	% Change From May '91	Year-to-Date 1992	% Change From '91	% Market Share '92
TOTAL RVs	30,430	-9.6	23.0	164,750	96.6	100.00
Travel Trailers:						
Conventional	4,790	5.7	3.9	23,130	64.3	14.04
Park Models	560	-11.1	-1.8	2,930	49.5	1.78
Fifth-wheels	3,510	17.4	47.5	15,910	97.6	9.66
All Travel Trailers	8,870	8.8	17.3	41,960	74.2	25.47
Folding Trailers	3,890	-16.2	37.9	19,230	67.6	11.07
Truck Campers	870	-17.9	19.2	4,700	50.2	2.85
TOTAL TOWABLES	13,630	-1.6	22.7	64,890	70.3	39.39
Motorhomes:						
Class A	2,030	-6.5	4.6	11,130	62.7	6.76
Class B	230	27.8	-25.8	1,170	-14.6	0.71
Class C	1,170	-19.3	6.4	6,470	87.5	3.93
Minis	0	0.0	0.0	0	-100.0	0.00
Low-profiles	150	-28.6	114.3	800	6.7	0.49
Micro-minis	1,320	-20.5	12.8	7,270	71.5	4.41
TOTAL MOTORHOMES	3,580	-10.7	4.7	19,570	57.2	11.88
Van Conversions	13,230	-16.4	29.6	80,290	141.5	48.73

Source: RVIA, compiled from industry reports. Figures are preliminary and subject to change.

COMPUTER GRAPHICS: CAROL HENRY